



UNIVERSITY OF MASSACHUSETTS

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University Treasurer's Office

Wednesday, May 25, 2011

COMMERCE MANAGER DEMONSTRATION



What is Commerce Manager?

- Commerce Manager (QuikPay) is an online third party *payment processor* specifically designed for events and conferences
- We create a link that your technical contact embeds on either your department or event website
- Each event configuration is unique based on your event requirements
- Can be used to collect up to 10 fields of attendee information
- Separate reporter site to log in and run reports on all of your events based on various criteria
- Test and production modes to allow testing and changes




What does Commerce Manager cost?

- ⦿ There are NO set-up fees for Commerce Manager
- ⦿ Payments processed through Commerce Manager are processed directly into your Fifth Third bank account
- ⦿ CM journals are auto-generated to a default chartstring (by campus) in the General Ledger and are then moved monthly to your chartstring
- ⦿ \$0.25 per transaction plus usual credit card fees (transaction and interchange fees)
- ⦿ Fees are allocated monthly

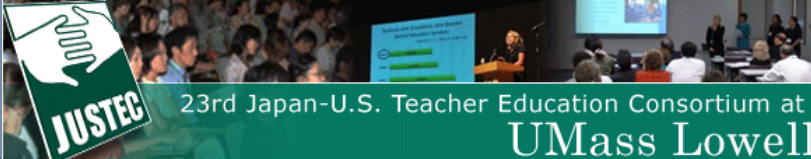



What does Commerce Manager look like?

University of Massachusetts Lowell




Japanese and U.S. Teacher Educator Consortium (JUSTEC)



23rd Japan-U.S. Teacher Education Consortium at UMass Lowell

JUSTEC - Japanese and U.S. Teacher Educator Consortium

[UML Home >](#) [JUSTEC Conference](#) [Printer Friendly](#)



23rd Annual JUSTEC Conference

September 11-14, 2011
UMass Lowell Inn & Conference Center

The Japanese and U.S. Teacher Educator Consortium (JUSTEC) holds an annual conference to share research and best practices, and to engage in dialogue on education issues of interest in both Japan and the U.S. The location of the conference alternates between Japan and the U.S. This year's meeting will be held in Massachusetts for the first time.

The 2011 JUSTEC Conference will be hosted by the University of Massachusetts Lowell. It will take place from September 11-14, 2011 at the [UMass Lowell Inn & Conference Center](#).

The featured [Keynote speaker is Dr. Brad Jupp, Senior Program Advisor, U.S. Department of Education](#).

University administrators and faculty, PK-12 administrators and teachers, and graduate students are invited to submit proposals for the conference. In addition to presentations, active participation is welcomed on topics confronting both Japanese and U.S. Teacher Education. Handouts for presentations should be prepared in both English and Japanese. The primary language for presentations at the seminar will be English.

Conference Fee:

- Participants: \$400
- Students and Guests: \$250
 - Includes: registration, meals and cultural options.

Register on-line for the 2011 JUSTEC Conference.

Link to Commerce Manager is embedded on your department/event website.



What does Commerce Manager look like?

Enter Payment Amount

Please enter in the amount you want to pay and click "Continue" button.

Event:	Your Event
Hosted by:	UMass/Your Department
Attendee First Name:	<input type="text"/>
Attendee Last Name:	<input type="text"/>
Organization:	<input type="text"/>
Title:	<input type="text"/>
Attendee Phone:	<input type="text"/>
Attendee Email Address:	<input type="text"/>
Attendee Address (Street, City, State, Zip):	<input type="text"/>
T-Shirt Size:	Small <input type="button" value="v"/>
T-Shirt Color:	Red <input type="button" value="v"/>
I would like to receive email updates regarding future events:	<input type="checkbox"/>
Payment Amount:	Member (\$25.00) <input type="button" value="v"/>
Payment Method:	Credit Card <input type="button" value="v"/>

These 4 fields are automatic and do not require using the User Defined Fields.



What does Commerce Manager look like?

Provide Credit Card Information

Please enter your credit card information in the following fields, then click "Continue" button.
NOTE: All fields are required.

For help, please click on the question mark next to a field.

Current Payment

Your Event	Payment Amount:	\$50.00
	Effective Date:	12/07/2011

Credit Card Information

Cardholder's Name: John Smith

Card Type: MASTERCARD

Credit Card Number: XXXXXXXXXXXXXXXXXXXX [Enable virtual keypad](#)

Expiration Date: 09 / 2020

Billing Address Information

Address 1: 456 Random Ave

(optional) Address 2:

City: Old City

For U.S. Address

State: NEW YORK

Zip: 22222

For International Address

Region / Province:

Postal Code:

Country: UNITED STATES

Contact Information

Daytime Phone: 555-555-5555
e.g. (555) 555-1212x123 OR +31 42 123 4567

Email Address: jsmith@bigcompany.com

This information will vary depending on how you complete the "Additional Required Fields" section of the form.



What does Commerce Manager look like?

Is this Credit Card information correct?

Please review your credit card information.

- To submit a payment, please click the "Confirm" button.
- To make changes, please click the "Edit" button.
- To cancel a payment, please click the "Cancel" button.

Current Payment		
Your Event	Payment Amount:	\$50.00
	Effective Date:	12/07/2011

Credit Card Information	
Cardholder's Name:	John Smith
Card Type:	MASTERCARD
Credit Card Number:	*****5454
Expiration Date:	09 / 2020

Billing Address Information	
Address 1:	456 Random Ave
City:	Old City
State:	NY
Zip:	22222

Contact Information	
Daytime Phone:	(555)555-5555
Email Address:	jsmith@bigcompany.com


← Payer gets to preview their information before completing the payment.



What does Commerce Manager look like?

Payment Receipt

This is your receipt.

Please click the Print icon to generate a printer-friendly version and print a copy for your records.  [Print](#)

The payment has been submitted by Commerce Manager Payer. Thank you.

Confirmation Number: 1703

Payment Date: Dec 7, 2011 at 10:28 AM, CST
Effective Date: Dec 7, 2011
Primary User Name: Commerce Manager Payer
Event: Your Event
Hosted by: UMass/Your Department
Payment Amount: \$50.00
Cardholder's Name: John Smith
Payment Method: MASTERCARD *****5454
Attendee First Name: Jane
Attendee Last Name: Doe
Organization: Big Company
Title: President
Attendee Phone: 555-555-5555
Attendee Email Address: jdoe@bigcompany.com
Attendee Address (Street, City, State, Zip): 123 Some St., New City, MA 11111
T-Shirt Size: M
T-Shirt Color: Blue
I would like to receive email updates regarding future events: true
Billing Address Info: 456 Random Ave
Old City, NY 22222
Contact Info: (555)555-5555 (daytime phone)
jsmith@bigcompany.com

← Payer receives a receipt that they should print for their records.



How Do I Request Commerce Manager?

- The Commerce Manager Request form is located on the Treasurer's Office website in the Merchant Services section
- <http://media.umassp.edu/massedu/treasurer/Commerce%20Manager%20Request%20Form.pdf>
- The form must have approval from the Department Head and final approval from the campus eCommerce Representative
- Forms must be complete in order to be processed



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Commerce Manager Request Form

Commerce Manager is a credit card processing solution for departments who need to take credit cards for small workshops, events, etc. Please allow **AT LEAST TWO WEEKS** from the date this form will be provided to the Treasurer's Office until the website start date (go live). The Central eCommerce office can be reached at 774-455-7581 if you have questions.

Please provide a short description of your credit card processing need:

Department Head authorization to take credit cards

Print Name Signature Date

Department/Event Information

- Department Name _____
- Event Name _____
- Event Date(s) _____
- Website Start Date (go live) Date you want CM url - allow 2 weeks _____
- Website End Date Date you want url disabled _____
- Contact Person _____
 - Phone _____ email _____
- Technical contact* _____
 - Phone _____ email _____

*Technical contact is someone who has access to your web page for development. Some changes to insert Commerce Manager will need to be made.

- Speedtype for Revenue _____ Account _____
Fund _____ Department _____ Program Code _____
Class _____ Project/Grant _____ Business Unit _____
- Speedtype for Fees _____ Account _____
Fund _____ Department _____ Program Code _____
Class _____ Project/Grant _____ Business Unit _____



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Payment Information

- Payment Amount(s) _____
o Please attach a separate sheet if you have multiple rates and cannot fit on this line, ex: student \$10, public \$35
- Late Fee Yes No If yes, what amount _____ as of what date _____
- Will you need to be able to enter payments on the behalf of an attendee (i.e., they are on the phone or in person) Yes No If yes, please provide Controller's sign-off.

Print Name _____ Signature _____ Date _____

- Card/Account Types: MasterCard
 American Express
 Discover
 Visa
- Additional Required Fields: (for payer) Address associated with account
 Daytime telephone number
 Evening telephone number
 Email address
 Allow international addresses

Reporting Information

Please list the names and emails of those who will need access to Commerce Manager reporting

User Defined Fields

You have the ability to add 10 user defined fields in order to gather information about the attendee. We recommend that the participant/attendee name be one of them to differentiate from the payer in case it is two different people. Your fields can be a text box (enter free form data) or Drop Down box (list of choices) or Checkbox (Y/N answer to a question). If you choose Drop Down box, indicate your list values (see example on next page). You can also choose to make these fields either required or optional for the payer to complete.

- User defined fields will be used (fill out the table on the next page).
- User defined fields will not be used.

Payment amounts appear in a drop-down menu only. See example of multiple payment amounts on the next page.

This is no longer an option, please do not complete this section.

Some campuses do not allow certain card types, please ask your campus eCommerce Representative if you have questions.

This is information gathered about the cardholder, who is not necessarily the attendee. It is strongly recommended that you always request the email address and daytime telephone number in case there is a problem with the credit card (see the bottom of Page 6).



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Your Event Pricing

Before November 1, 2020

Member (Event Only) \$25.00
Member (Event + Dinner) \$50.00
Non-member (Event Only) \$50.00
Non-member (Event + Dinner) \$75.00
Dinner Only \$35.00

After October 31, 2020

Member (Event Only) \$40.00
Member (Event + Dinner) \$65.00
Non-member (Event Only) \$65.00
Non-member (Event + Dinner) \$90.00
Dinner Only \$50.00

Prices can be updated on specific dates. This is a manual change that has to be made Mon-Fri from 8:00am-4:30pm.

Prices are in a dropdown menu only and only one selection can be made. An option needs to be listed for each possible pricing combination.



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Enter Payment Amount

Please enter in the amount you want to pay and click "Continue" button.

Event: **Your Event 2**
 Hosted by: UMass/ Your Department
 Event Date: December 31, 2020
 Event Location: Fancy Hotel, Boston, MA

Attendee First Name:
 Attendee Last Name:
 Organization:
 Title:
 Attendee Phone:
 Attendee Email Address:
 Attendee Address (Street, City, State, Zip):
 I would like to receive email updates regarding future events:
 Payment Amount: Member (\$25.00)
 Payment Method: Credit Card

<u>FIELD</u>	<u>LABEL</u>	<u>REQUIRED</u>	<u>TYPE</u>	<u>*DROP DOWN BOX VALUES</u>
EXAMPLE OF USER DEFINED FIELD	WATER BOTTLE COLOR	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> TEXT BOX <input checked="" type="checkbox"/> DROP DOWN* <input type="checkbox"/> CHECKBOX (Y/N)	GREEN BLUE RED
User Defined Field 1 (recommend this be attendee name)	Event Date	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input checked="" type="checkbox"/> TEXT BOX <input type="checkbox"/> DROP DOWN* <input type="checkbox"/> CHECKBOX (Y/N)	December 31, 2020
User Defined Field 2	Event Location	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input checked="" type="checkbox"/> TEXT BOX <input type="checkbox"/> DROP DOWN* <input type="checkbox"/> CHECKBOX (Y/N)	Fancy Hotel, Boston, MA



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Campus eCommerce Representative Approval (to be approved after form is complete and then faxed to Jen Kroleski at 774-455-7592)

Print Name _____

Signature _____

Date _____



This section must be signed by your campus eCommerce Representative in order to be processed.



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QUESTIONS?